



Las Vegas GROWTH WATCH

BUILDING LAS VEGAS INTO A WORLD-CLASS CITY

Community Attitude and Interest Survey

The city of Las Vegas conducted a Community Attitude and Interest Survey during May and June of 2004 to help establish priorities for the planning of parks, trails, open space areas and outdoor recreation facilities within the northwest region of Las Vegas. The telephone and mail survey was administered with the goal

of obtaining a large enough sample to draw statistically valid conclusions about the opinions of the residents of northwest Las Vegas regarding parks and recreation. The survey yielded enough respondents, 688, to draw conclusions about the residents with at least a 95% level of confidence.

The final report contains detailed data on the responses, with cross-tabulations on responses by a variety of categories including age, gender, household income, visitation of parks, and number of years living in the northwest region. These results will help the city develop a plan for improving the network of parks and trails in northwest Las Vegas.

Overall, it appears that most residents of the area who have visited city of Las Vegas parks in the last year are satisfied with the physical conditions of those parks. In fact, 91% of those who had visited a park in the last year

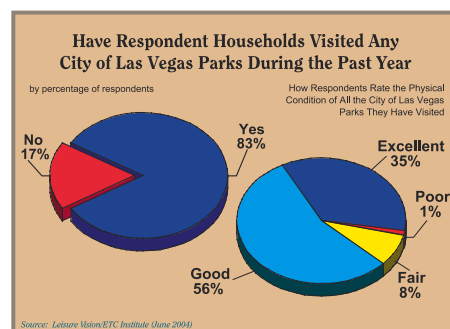


Chart shows how respondents rated the physical condition of the city's parks visited during the past year.

rate the physical conditions as either excellent or good.

A number of questions were posed to determine which of 12 specific goals of the Northwest Regional Open Space Plan are most important to residents. Three goals were rated as very important by more than 50% of respondents, including: preservation of natural areas and view sheds; provision of habitats for wildlife, birds, and plant life; and preservation of open space flood plain areas. Provision of habitats for wildlife,

Summer 2004

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birds, and plant life was rated as one of the three most important goals by the highest percentage of respondents, while development of new sports fields was rated as the single most important goal by the largest percentage of respondents. Residents were asked a series of questions to determine which of a list of 25 types of outdoor parks and recreation facilities were most important to the individuals in their households. Walking and biking trails were listed by the largest percentage of households as a need. Only five were listed as fully meeting the needs of

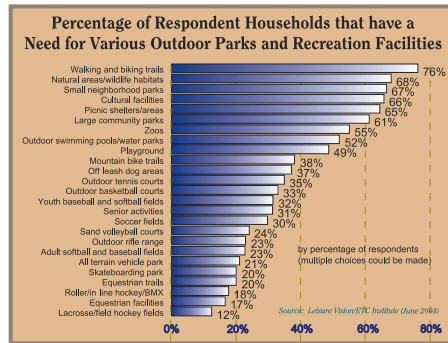


Chart shows how respondents rated desired city park services and facilities.

their households by at least 25% of the respondents, with large community parks leading the way.

The results of the survey indicate that the residents are prepared to help support the protection of natural landscapes, with 85% answering that they were either very or somewhat supportive of the protection of various lands as natural landscapes by using them for projects such as walking, biking and equestrian trails. Further, 86% listed funding of improvements to outdoor parks, trails, and facilities compared to other priorities in the northwest region of Las Vegas as either very or somewhat important.

LONG-RANGE PLANNING

COUNCIL WARD REDISTRICTING

The city of Las Vegas is comprised of six council wards. The council representatives are voted upon by the voters within each council ward's boundaries and serve four-year terms. As of July 1, 2003, the population of the city of Las Vegas was 535,259. Ideally, the population of each council ward is about equal. That would mean each council ward should have a population of about 89,210. The population in the existing council wards varies significantly from this figure. Ward 1 currently has the lowest population,

79,629, while Ward 6 has the highest population, 103,656. The population discrepancy between the two wards is more than 30 percent. A number of issues arise when ward populations vary to such a degree, such as the workload of the council members and their staff, and the concept of each person's vote having equal weight.

The city is currently looking into redistricting the council wards in order to create a more equitable population distribution. In order to keep new ward populations from being outdated for as long as possible, the city is allowed to create new boundaries that take into consideration future population growth.

Since 1990, more than 96 percent of the city of Las Vegas' population

growth has occurred west of Decatur Boulevard. During the past year, nearly 50 percent of the city's growth occurred in Ward 6 alone. All indications are that these trends will continue, as the majority of land available for future development is in the west and northwest portions of the city.

Given the constraint that the number of residents in the newly drawn council wards cannot vary by more than 10 percent, the population can range from approximately 85,750 to 94,250. By assigning a greater number of residents to council wards where the population is growing more slowly and assigning fewer residents to wards where there is significant population growth, a certain amount of equity can be attained.

Council Ward	After 6/5/02 Redistricting, based on Census 2000	2002 Population	2003 Population	Population 00 - 03	Change 02 - 03	Percent 00 - 03	Percent 02 - 03
Ward 1	81,306	80,225	79,629	(1,677)	(596)	-2.1%	-0.7%
Ward 2	78,509	90,877	94,270	15,761	3,393	20.1%	3.7%
Ward 3	80,573	81,263	81,842	1,269	579	1.6%	0.7%
Ward 4	80,778	88,462	92,432	11,654	3,970	14.4%	4.5%
Ward 5	79,574	83,224	83,440	3,866	216	4.9%	0.3%
Ward 6	78,031	96,885	103,656	25,625	6,771	32.8%	7.0%
Total	478,771	520,936	535,269	56,498	14,333	11.8%	2.8%

Source: City of Las Vegas Planning and Development Department, Comprehensive Planning Division 2004

DEVELOPING MASTER-PLANNED COMMUNITIES: SMART GROWTH AT THE EDGE

The Urban Land Institute (ULI) hosted the “Developing Master-Planned Communities: Smart Growth at the Edge” conference on June 7 and 8 in beautiful La Jolla, California. The setting was wonderful – the La Jolla Hilton is built on a ridge overlooking the ocean, between the forested UCSD campus and the famous Torrey Pines Golf Course, which will host the U.S. Open in 2008.

Master developers, builders and consultants enthusiastically presented a range of innovative master-planned projects from California to Colorado, from Massachusetts to Florida. These cutting-edge companies are eagerly searching for ways to make their master-planned communities exciting, unique and attractive, not for altruistic reasons, but because they have determined that this is the best way to maximize value and generate faster sales, even in super-heated economies like southern California.

Plenary and elective sessions covered a broad range of ideas, from the nuts



4S Ranch in Rancho Bernardo, California



Rendering for illustrative purposes of San Elijo Hills Community Park, located in the city of San Marcos, California.

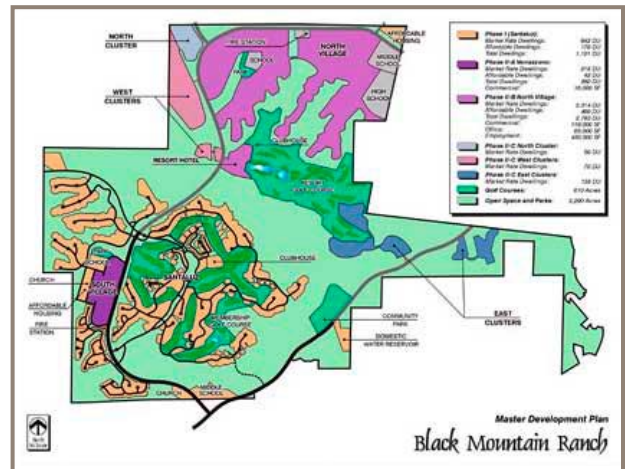
and bolts of “green community” development such as new development on the outskirts of an urban area and selling density in these communities, to the specifics of niche marketing, the role of active lifestyles and the importance of soft programming, and how to plan for amenities that sell.

A bus tour was offered to visit three local master-planned communities, all in the relatively early stages of development, but far enough along that the results and benefits were clearly evident. The Santaluz development (Taylor, Woodrow Homes and DMB Associates) about ten miles from La Jolla is a 3,800-acre community developed at four acres per unit with 308 lots, some developed in clusters of eight, surrounded by 1,500 acres of open space, a private golf course and an exotic community center. Homes two years ago were priced from \$600,000 to \$1.4 million. It now has more than doubled on both ends.

The 4S Ranch in Rancho Bernardo, about 10 miles further north, was the next stop. Carved out of the Ralph family ranch (as in Ralph’s Food Stores), this community was more traditional in design and had much

in common with similar local development here. Prices started at \$500,000, rising to approximately \$1.2 million for custom homes.

The final stop was San Elijo Hills – perhaps most impressive for its town center park and the integration of shopping and live-work units (at 26 u/a) in a tightly scripted community core. Planned with assistance from Peter



Rendering for illustrative purposes of the Santaluz development.

Calthorpe, and requiring the moving of 15 million cubic yards of earth to create the development site, the community’s builders – including companies familiar in this valley (Pulte, John Laing, Greystone, Beazer and Richmond American, to name a few) – are producing a unique community six miles south of Carlsbad that will set the tone and challenge other developers for some time to come.

The topics were uniformly interesting and informative, with many ideas in practice that are only conceptual here. Perhaps as these success stories garner wider national exposure, the city will board the master development train and experience some of these innovative out-of-the-box ideas locally.

CENTENNIAL SPOTLIGHT ON DOWNTOWN POST OFFICE

In May 2005 as Las Vegas celebrates its 100th anniversary, a handful of historic buildings will shine in the Centennial spotlight. Chief among them is the historic United States Post Office and Court House that has graced downtown on Stewart Avenue for more than 70 years.

Built in 1933 as part of an expansive federal building program during the depression era, the Post Office was both an architectural and political accomplishment. Some time after the city's founding, the state's congressional delegation waged a relentless campaign to secure funds for a new federal building that would solidify the city's place as a primary hub in the desert southwest. The effort was partly fueled by the construction of nearby Hoover Dam, one of the largest public works projects in the nation. Success finally came in 1929 when Congress approved \$300,000 for a new Post Office, a facility that 25 years earlier had been housed in a downtown tent. In the years following, the new U.S. Post Office would become a stately neoclassical monument announcing a new federal presence in the city and aligning its civic purpose with that of other American cities.

When completed, the new U.S. Post Office and Courthouse in Las Vegas was an instant success in a city longing for civic identity and social permanence. Its classical exterior echoed a tasteful institutional interior of formal public spaces that, on the first floor, included a lobby, banks of post

office lock-boxes, customer service windows and state of the art employee workrooms. Interior details such as terrazzo floors with marble accents, imitation travertine walls and decorative ironworks added an air of refinement. The second floor featured the U.S. District Court Room and judicial offices while the third floor housed a variety of federal offices. The original elevator, one of the city's first, is still in operation. The U.S. District



Historic U.S. Post Office in downtown Las Vegas built in 1933.

Courtroom was the stage for the sensational Kefauver crime hearings in the 1950s that brought national attention to Nevada's gambling laws. The city's Mayor, Oscar Goodman, tried his first case there as a criminal defense attorney in 1965.

Through the years, the services of the downtown Post Office and Courthouse diminished. The building lost its designation as the main Post Office in 1961, and the District Court moved into a new building in 1967. In fact, with shifting demographics, new economic realities and the changing postal needs of the American public, the federal government has for some years been disposing of some of its inner city landmark buildings through a process of "civic adoption" and adaptive reuse as cultural facilities.

Following this trend, last year the General Services Administration and the National Park Service conveyed title of the building to the city of Las Vegas on the condition that the building be used for cultural purposes. City officials, led by Mayor Goodman, championed the idea and saw the historic structure as a key part of the redevelopment of the city's urban core.

The City assembled a Post Office team comprised of staff from various departments to oversee the acquisition and future stewardship of the building, coordinated through the Architectural Services and the Cultural Division. Nancy Deaner, Manager of the Cultural Division, took a lead role in developing a strategy that addressed both preservation of the building and the programming that eventually might take place within the facility.

The team hired professional museum consultants Chattel and Goldstein, a firm that specializes in historic preservation cultural urban planning. Robert Chattel examined the building to determine a strategy for adaptive reuse while Carol Goldstein surveyed a select, but wide swath of the community, interviewing almost 150 individuals from all over the valley. The consulting team released a report with recommendations that was presented to the City Council and Historic Preservation Commission in May of this year. This report is a blueprint for preserving the building and recommendations for its cultural uses.

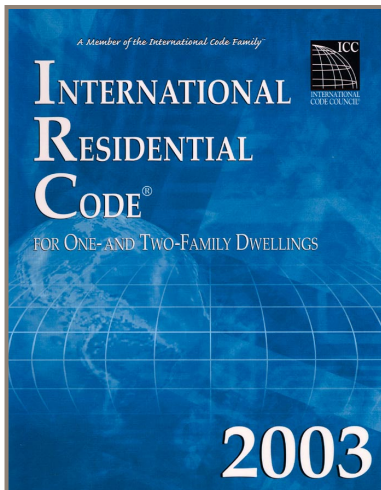
Funding from the State's Cultural Commission has provided almost \$500,000 for rehabilitation and mechanical upgrades, and a federal grant from the Institute of Museums and Library Services will provide funds for installation of exhibit-related equipment. Ron James, Nevada's preservation officer, commented that this funding helps move the Post Office project forward. "It has the potential to become a distinguished attraction for both tourists and residents," he said.

The few remaining tenants of the Post Office will be out at the end of 2004. It may be some time before the building opens to the public in its new cultural incarnation-whatever that may be. Meanwhile, as the Centennial approaches, the city intends to spotlight the structure through public tours and other special events.

PATIO COVERS

The Planning and Development Department will utilize the 2003 International Residential Building Code definition for patio covers. The building code definition is listed in Appendix H under section AH102 of the building code.

The definition states that a patio cover can be enclosed with insect screening, approved translucent or transparent plastic not more than 0.125 inch in thickness, glass conforming to the provisions of Section R308 or any combination of these three materials.



The Planning and Development Department will be following the 2003 International Residential Building Codes regarding patio covers.

The setbacks for a patio cover are determined by the zoning district requirements for the subject site. A patio cover is a single-story structure that cannot exceed twelve feet in height. In addition, a patio cover cannot be used as a carport, garage, storage room or habitable room. The air space within a patio cover cannot be heated or air-conditioned; however, electrical wiring for lighting or ceiling fans is allowed.

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ARTIFICIAL TURF

Ed Fountain Park, located near Vegas Drive on Decatur Boulevard, is undergoing a major makeover by the city of Las Vegas. Built in 1970, the 18-acre park is in the midst of a \$6.1 million renovation. The new park will include five new, lighted soccer fields. Two of the fields will use Pro Green Xtreme water-saving artificial turf. According to the Southern Nevada Water Authority, the installation of artificial turf on two soccer fields will save an estimated 21,824,000 gallons of water each year. The City Council has made water conservation a priority. The council

also recently approved installing seven artificial turf soccer fields at the Washington-Buffalo Park currently under construction.



Recent renovation of soccer fields at Ed Fountain Park includes installation of artificial turf as part of the city's efforts to save water.

PARKS ELEMENT STATUS UPDATE

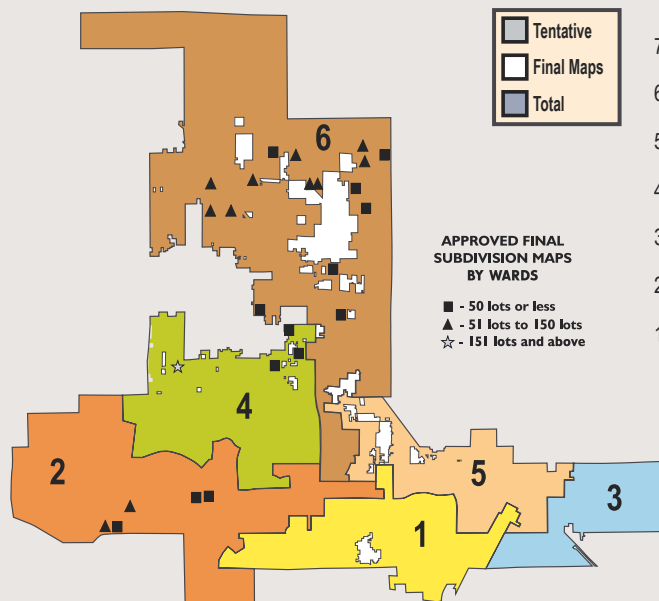
The Las Vegas Master Plan 2020 set a guide for the formulation of a five-year capital improvements program, as well as a basis for programming capital projects over a 20-year time period to satisfy the city's long-range needs for parks and recreational facilities. As part of LVMP 2020 a goal of 2.5 acres of park space per 1,000 residents was set. This goal was originally established by the Southern Nevada Strategic Planning Authority (SNSPA) and was found to be realistic and attainable.

It is worth noting that many state and federal parks, such as Red Rock Canyon National Conservation Area and Floyd Lamb State Park, exist within a relatively short distance of Las Vegas, reducing the burden on local agencies to provide large quantities of land for park development. Because of this, the SNSPA decided to set the goal for park acreage per 1,000 persons far below the traditional standard of 10 acres per 1,000 persons. Further, there are a great number of areas designed for specific

leisure activities, such as recreation centers and golf courses, each of which would increase the acreage per 1,000 persons of all entities considerably, should they be incorporated into the figures.

The city of Las Vegas has taken great strides in trying to meet the goals set forth by the SNSPA. This is a difficult task to undertake, given the rapid population growth that is taking place within Las Vegas. The original parks element reported that the city owned and operated 486 acres of parks space, which yielded 1.1 acres of parks per 1,000 persons (using the July 1, 1998 population of 448,244). As of March 2004, the City owned and operated 841 acres of parks, or 1.6 acres of parks per 1,000 persons, given the July 1, 2003 population estimate of 535,269.

While the progress of the past few years is striking, plans are already in place to further improve the ratio of park acres per person. A number of parks are in various phases of planning and/or construction that will continue to move the city of Las Vegas towards meeting the goals established in the parks element of LVMP 2020.

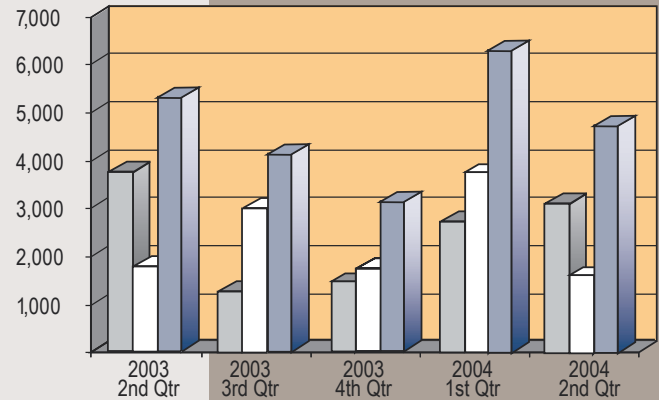


Leading Economic Indicators For Clark County

"The Southern Nevada Index of Leading Economic Indicators continues to move upward, suggesting continued economic expansion during the remainder of 2004. Of note, visitor volume, air passengers at McCarran Airport, and gallons of gasoline (all indicators of the travel and tourism sectors) contributed in a large and positive manner to the index's expansion. In addition, the construction series, all up from a year-ago levels, have shown signs of a recent slowdown from the rapid pace over the past year. All in all, southern Nevada will share in the nation's economic expansion for the months ahead."

Source: UNLV Center for Business and Economic Research

Approved Subdivision Lots



Source: city of Las Vegas

Approved Subdivision Lots

	Tentative Maps	Final Maps	Total
2nd Qtr -2003	3,596	1,431	5,027
3rd Qtr -2003	1,143	2,823	3,966
4th Qtr -2003	1,379	1,574	2,953
1st Qtr -2004	2,558	3,645	6,203
2nd Qtr -2004	2,952	1,521	4,473
% Chg Last Qtr.	15.4	-58.3	-27.9
% Chg Last Year	-17.9	6.3	-11.0

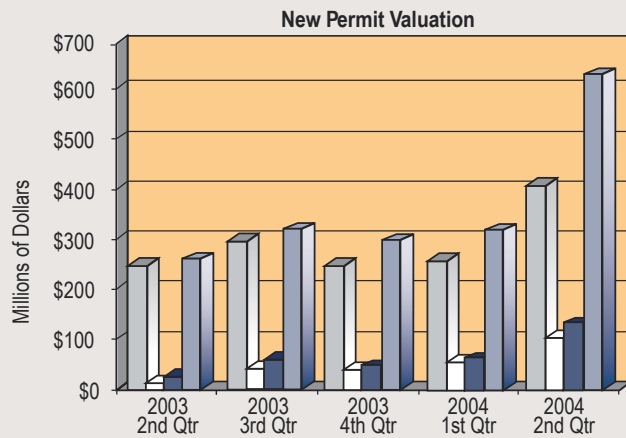
Leading Economic Indicators

CLARK COUNTY SERIES	DATE	UNITS	LATEST PERIOD	CHANGE PREVIOUS PERIOD	CHANGE YEAR AGO	CONTRIBUTION TO INDEX**
RESIDENTIAL BUILDING						
Units Permitted	Apr-04	#Permitted	3,680	-5.01%	34.50%	-0.004%
Valuation	Apr-04	Dollars	\$398,122,863	-4.33%	41.05%	-0.004%
COMMERCIAL BUILDING						
Permits	Apr-04	#Permitted	94	-7.84%	22.08%	-0.040%
Valuation	Apr-04	Dollars	\$151,479,892	230.05%	422.05%	-0.040%
TAXABLE SALES	Apr-04	Dollars	\$2,390,258,612	-8.52%	13.77%	-0.028%
McCARRAN AIRPORT	Apr-04	Passengers	3,569,915	-1.83%	23.32%	-0.220%
GALLONS OF GASOLINE	Apr-04	Thousands of Gallons	60,579,924	-0.63%	8.91%	0.089%
GROSS GAMING						
Revenue	Apr-04	Dollars	\$678,719,347	-12.57%	11.47%	-0.115%
CONVENTIONS						
Visitors	Apr-04	People	3,242,858	-1.52%	10.54%	0.131%
Attendance	Apr-04	People	440,822	-28.70%	19.97%	-0.011%
OVERALL CHANGE *	Jun-04		129.23	0.20%	2.45%	0.20%

* The index is a six month forecast (October 2004) from the month of the data (April 2004) and four months from the month of the series (June 2004).

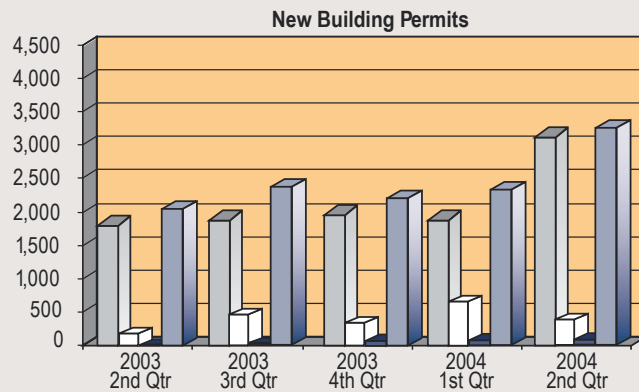
** The contribution to the Index is a net-weighted average of each series after adjustment for seasonal variation.

Source: UNLV Center for Business and Economic Research

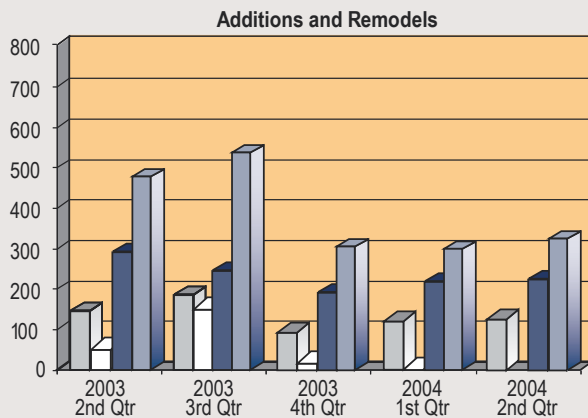


New Permit Valuation				
	Single Family	Multi-Family	Commercial	Total
2nd Qtr - 2003	\$228,333,257	\$9,432,137	\$23,764,579	\$261,529,973
3rd Qtr - 2003	\$252,425,655	\$27,542,123	\$42,001,671	\$321,969,449
4th Qtr - 2003	\$226,284,644	\$26,163,503	\$36,834,155	\$289,282,302
1st Qtr - 2004	\$236,567,086	\$38,637,924	\$54,744,509	\$329,949,519
2nd Qtr - 2004	\$394,595,953	\$101,228,182	\$131,697,937	\$627,522,072
% Chg Last Qtr.	66.8	162.0	140.6	90.2
% Chg Last Year	72.8	973.2	454.2	139.9

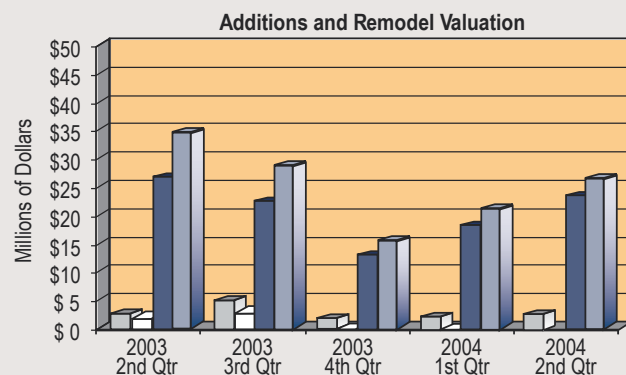
Source: city of Las Vegas (including subdivision information)



New Building Permits				
	Single Family	Multi-Family	Commercial	Total
2nd Qtr - 2003	1,730	135	35	1,900
3rd Qtr - 2003	1,864	394	37	2,295
4th Qtr - 2003	1,799	293	53	2,145
1st Qtr - 2004	1,704	514	52	2,270
2nd Qtr - 2004	2,914	211	55	3,180
% Chg Last Qtr.	71.0	-58.9	5.8	40.1
% Chg Last Year	68.4	56.3	57.1	67.4



Additions and Remodels				
	Single Family	Multi-Family	Commercial	Total
2nd Qtr - 2003	134	54	280	468
3rd Qtr - 2003	174	134	228	536
4th Qtr - 2003	90	23	195	308
1st Qtr - 2004	97	4	202	303
2nd Qtr - 2004	106	-	206	312
% Chg Last Qtr.	9.3	-	2.0	3.0
% Chg Last Year	-20.9	-	-26.4	-33.3



Additions and Remodel Valuation				
	Single Family	Multi-Family	Commercial	Total
2nd Qtr - 2003	\$2,062,964	\$634,734	\$30,837,197	\$33,534,895
3rd Qtr - 2003	\$4,285,043	\$2,075,271	\$21,584,589	\$27,944,903
4th Qtr - 2003	\$1,685,229	\$183,500	\$13,981,395	\$21,584,589
1st Qtr - 2004	\$1,812,896	\$51,200	\$18,556,114	\$20,420,210
2nd Qtr - 2004	\$2,117,765	\$ -	\$23,528,417	\$25,646,182
% Chg Last Qtr.	16.8	-	26.8	25.6
% Chg Last Year	2.7	-	-23.7	-23.5

COUNCILMAN STEVE WOLFSON

In a historic special election on June 22, 2004, Steve Wolfson was elected to serve as the city of Las Vegas Ward 2 City Councilman.

Wolfson was born in Los Angeles, California, in 1954. In his primary school years, he was a Cub Scout. By junior high, sports were his biggest attraction. He played in Little League for four years and three more years in Senior League. In high school, he lettered in both basketball and baseball.

Councilman Wolfson graduated from San Diego State University in 1977 with a bachelor's degree in criminal justice. Following graduation, he began his law studies at the California Western School of Law. He graduated in 1980 with a Juris Doctorate.

Wolfson began his legal career as a prosecutor in the criminal division of the Clark County District Attorney's Office. After six years, he joined the United States Attorney's Office as a prosecutor. In 1987, he entered private practice where he continues today.

Throughout his career, Wolfson has always been active in his profession. Until recently he served on the Board of Governors of the State Bar of Nevada and on the Judicial Ethics and Campaign Election Practices Committee. Wolfson also chaired the Southern Nevada Disciplinary Board for the State Bar of Nevada and served as a member of the board for seven years.

Additionally, he is an Inquest Hearing Officer for the Coroner's Office, and has served as Justice of the Peace, Pro Tempore, in both Las Vegas and North Las Vegas. He also served as Municipal Court Judge, Pro Tempore, for the city of Las Vegas.



New councilman for Ward 2, Steve Wolfson.

Wolfson is a member of the Latin Chamber of Commerce and the Asian Chamber of Commerce, and was a board member for UNLV Boxing.

After moving to Las Vegas and beginning his law practice, Councilman Wolfson met young Channel 13 news reporter and weekend anchor Jackie Glass. The couple married in 1984. They have two daughters, Rachel, age 17, and Rebecca, age 12. In 2002, Jackie was elected as a District Court judge. Wolfson enjoys spending time with his family, golf, travel and movies.

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